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6078903.uref.	2

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DATE: Saturday, October 29, 2005 Printable Copy Create Case

Set Name side by side	Query	Hit Count	Set Name result set
	DB=PGPB,USPT,USOC,EPAB,JPAB,DWPI,TDBD; PLUR=YES; OP=OR		
L33	6078903.uref.	2	L33
L32	6249775.uref.	6	L32
L31	6202053.uref.	6	L31
	DB=USPT; PLUR=YES; OP=OR		
L30	(5878403 | 5592590 | 5550734 | 5262941 | 4774664 | 5611052 | 5696907 | 4866634 | 5227874 | 5583778 | 5383113 | 5111395 | 3316395)![PN]	13	L30
	DB=PGPB,USPT,USOC,EPAB,JPAB,DWPI,TDBD; PLUR=YES; OP=OR		
L29	('6202053')[ABPN1,NRPN,PN,TBAN,WKU]	2	L29
L28	6202053.pn.	2	L28
	DB=USPT; PLUR=YES; OP=OR		
L27	(4736294 | 5644727 | 5966700 | 4953085)![PN]	4	L27
	DB=PGPB,USPT,USOC,EPAB,JPAB,DWPI,TDBD; PLUR=YES; OP=OR		
L26	('6249775')[ABPN1,NRPN,PN,TBAN,WKU]	2	L26
L25	6249775.pn.	2	L25
L24	('6078903')[URPN]	2	L24

L23	('6078903')[ABPN1,NRPN,PN,TBAN,WKU]	2	L23
L22	6078903.pn.	2	L22
L21	L20 and portfolio	13	L21
L20	(vintage or age) near2 analysis	435	L20
L19	"vintage analysis"	5	L19
L18	L17 and 705/36	21	L18
L17	strategic and analytics	538	L17
L16	L15 and environment	18	L16
L15	L14 and (management with policy or management near policy or management adj policy)	20	L15
L14	portfolio and (market with competition or market near competition or market adj competition)	232	L14
L13	l10 and (market with competition or market near competition or market adj competition)	0	L13
L12	l10 and (seasonality or season)	7	L12
L11	L10 and portfolio	14	L11
L10	(vintage or age or characteristic old or classic) and (maturation or maturity or mature) near account	136	L10
L9	705/10	2629	L9
L8	709.clas.	39979	L8
L7	709/203	9906	L7
L6	705/40	1372	L6
L5	L3 and (vintage near behavior or age near analysis or risk near manage$)	1439	L5
L4	L3 and vintage near2 behavior	0	L4
L3	705.clas.	37573	L3
L2	705/38	909	L2
L1	705/36	1294	L1

END OF SEARCH HISTORY

L24: Entry 2 of 2 File: USPT Jun 11, 2002

US-PAT-NO: 6405179
DOCUMENT-IDENTIFIER: US 6405179 B1

TITLE: System and method for data collection, evaluation, information generation, and presentation

DATE-ISSUED: June 11, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Rebane; George J.	Topanga	CA		

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
Saddle Peak Systems	Topanga	CA			02

APPL-NO: 09/498922 [PALM]
DATE FILED: February 4, 2000

PARENT-CASE:
This application is a continuation of Ser. No. 09/042,592 filed on Mar. 16, 1998 now U.S. Pat. No. 6,078,904 of George J. Rebane Cosner entitled "Risk Direct Asset Allocation and Risk Resolved CAPM for Optimally Allocating Investment Assets in an Investment Portfolio", the entire disclosure of which is hereby incorporated by reference including the microfiche appendix attached thereto, as if set forth in its entirety herein.. MICROFICHE APPENDIX This application includes a microfiche appendix, including 1 sheet of microfiche and a total of 36 frames.

INT-CL: [07] G06 F 17/60

US-CL-ISSUED: 705/36; 705/35
US-CL-CURRENT: 705/36R; 705/35

FIELD-OF-SEARCH: 705/35, 705/36, 705/1

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

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PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
5774881	June 1998	Friend et al.	705/36
5784696	July 1998	Melnikoff	705/36
5799287	August 1998	Dembo	705/36
5806049	September 1998	Petruzzi	705/36

☐	5812987	September 1998	Luskin et al.	705/36
☐	5812988	September 1998	Sandretto	705/36
☐	5819237	October 1998	Garman	705/36
☐	5852811	December 1998	Atkins	705/36
☐	5884287	March 1999	Edesses	705/36
☐	5911135	June 1999	Atkins	705/36
☐	6021397	February 2000	Jones et al.	705/36
☐	6055517	April 2000	Friend et al.	705/36
☐	6061662	May 2000	Makivic	705/36
☐	6078903	June 2000	Kealhofer	705/36
☐	6154732	November 2000	Tarbox	705/36
☐	6219650	April 2001	Friend et al.	705/36
☐	6275814	August 2001	Giansante et al.	705/36

FOREIGN PATENT DOCUMENTS

FOREIGN-PAT-NO	PUBN-DATE	COUNTRY	CLASS
0572281	December 1993	EP	

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Lavine, Alan, "Technology Makes it Easier to do Financial Planning (Financial Planning Software)", Accounting Today, vol. 11, No. 21, p. 39(2), Nov. 1997.*
VALIC, "VALIC Announces Customer Account Access on Web Site", Dialog File 621:New Product Announcement, Jan. 1998.

ART-UNIT: 2161

PRIMARY-EXAMINER: Trammell; James P.

ASSISTANT-EXAMINER: Hayes; John W.

ATTY-AGENT-FIRM: Ganz Law, P.C. Ganz, Esq.; Bradley M.

ABSTRACT:

A system and method for the optimal allocation of investment funds among a portfolio of investments, and the optimal selection of candidate investments for the portfolio to optimize the financial risk of the investor relative to the financial returns. The system and method create risk tolerance functions for the investor which describe the investor's monetary utility through probability preferences with respect to specific currency amounts relative to the investor's overall assets restricted to the investors monetary range of interest. The risk tolerance function is then used in conjunction with a computed probability density function of the investment portfolio to create a probability density function of the investor's probability preferences with respect to the investor's risk tolerance function. The probability density function expresses the dispersion of risk preferences that the investor would experience as a result of the investment allocation. Investment funds are allocated to the investments of the portfolio by maximizing the expected value of the probability density function of the investor's probability preferences within a rich environment of possible parameters

20 Claims, 12 Drawing figures

Previous Doc Next Doc Go to Doc#

First Hit Fwd Refs Previous Doc Next Doc Go to Doc#

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L27: Entry 1 of 4 File: USPT Oct 12, 1999

US-PAT-NO: 5966700
DOCUMENT-IDENTIFIER: US 5966700 A

TITLE: Management system for risk sharing of mortgage pools

DATE-ISSUED: October 12, 1999

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Gould; Kenneth L.	Lake Forest	IL		
Pollock; Alex J.	Lake Forest	IL		
Lundstrom; Roger D.	Arlington Heights	IL		
Whelan; Frank D.	Lake Barrington	IL		

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
Federal Home Loan Bank of Chicago	Chicago	IL			02

APPL-NO: 08/997119 [PALM]
DATE FILED: December 23, 1997

INT-CL: [06] G06 F 15/00, G06 F 15/21, G06 F 17/60, G06 F 19/00

US-CL-ISSUED: 705/38; 705/35
US-CL-CURRENT: 705/38; 705/35

FIELD-OF-SEARCH: 705/35, 705/38

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

Search Selected Search ALL Clear

	PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
☐	4876648	October 1989	Lloyd	705/38
☐	4953085	August 1990	Atkins	705/36
☐	5611052	March 1997	Dykstra et al.	705/38
☐	5644726	July 1997	Oppenheimer	705/38

ART-UNIT: 277

PRIMARY-EXAMINER: MacDonald; Allen R.

ASSISTANT-EXAMINER: Myhre; James W.

ATTY-AGENT-FIRM: Mayer, Brown & Platt

ABSTRACT:

The present invention relates to a computer system for managing the allocation of mortgage pool risk between a mortgage originator and a funding institution. The mortgage originator issues a mortgage and the funding institution agrees to assume certain risks such as interest rate and credit risk for the mortgage up to a certain percentage. The mortgage originator and the funding institution enter into a Master Commitment agreement which has an overall credit enhancement value for mortgage funding by the mortgage originator. The system has an input device capable of receiving mortgage data from the mortgage originator. A memory has a database storing the data relating to the mortgage loan, Master Commitment, financial institution and rate and fees. A processor calculates a credit enhancement value as a function of the probability of foreclosure and the severity of loss indicated by mortgage data. An output device produces a delivery commitment in which the mortgage originator assumes obligation for losses up to the credit enhancement value and the funding institution assumes obligation for additional losses.

12 Claims, 24 Drawing figures

Previous Doc Next Doc Go to Doc#